

Reservist Annual Requirements Guide



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Annual Requirements

Annual Requirements - The following is a listing of the annual requirements Reservists are responsible for maintaining a GREEN readiness status (in addition, unit specific requirements may be provided by your supervisor, SERA and/or training manager):

- o **Schedule ADT in Direct Access** - (NLT 30 June or 45 days before the start of the tour...whichever is sooner and is based on FY funding)
- o **Schedule IDTs in Direct Access** - To ensure IDT orders are processed in time, IDTs should be scheduled NLT 1 September for the following Fiscal Year. Check with your supervisor for an IDT schedule (can be found on the Sector Jacksonville's reserve web page).
- o **Berthing Request** – If you live 50 miles or greater from your duty station, you may be eligible for berthing while performing IDT drills (submission is done by completing the form found on the web page).
- o **Medical Requirements** – Must complete the annual PHA (Physical Health Assessment) during your birth month (or up to three months prior) each year. Specific instructions for accomplishing this requirement are provided in this document.
- o **Dental Requirements** - Must be completed annually. Specific instructions for accomplishing this requirement are provided in this document.
- o **Contact Information** – Reservist ensures Direct Access is updated with current personal contact information (address / phone number(s))
- o **Hurricane Roster** - You must ensure correct contact information is included on the Hurricane Roster each year in April or when your contact information changes.
- o **ASQ - Civilian Employment Information Program** – Access form through Direct Access. The Federally mandated ASQ will be completed between the dates of 1 Aug and 31 Oct each year.
- o **Weigh-In – Bi-annual requirement during the months of April and October** – Report to your unit designated weight recorder during April and October each year to complete this requirement.
- o **CG 2020D, Record of Emergency Data** - Ensure your DD Form 93 is complete and updated in Direct Access
- o **SGLI (Serviceman's Group Life Insurance)** – You must verify the correctness of the SGLI form you have on file during the month of October each year or when your family situation changes.
- o **BAH Dependency Worksheet (CG Form 2020D)** – You must verify the correctness of your BAH worksheet each year during the month of October or when your family situation changes.
- o **Points Summary** - Ensure you were properly credited for the prior year's performance. A points summary is available in Direct Access.
- o **EOE – End of Enlistment (Enlisted only)** – Check to ensure your EOE does not expire this year. Contact RFRS to start the process for your Reenlistment.
- o **Evaluations** –If marks are due, ensure you provide your supervisor with inputs – Ensure you follow up on the completion of your report
- o **Rate and Competency Training** – Contact your SERA/Supervisor to enroll in correspondence courses and request in-residence courses.
- o **Security Clearance** – Contact either the reserve or active duty security officer in order to begin the process of obtaining a security clearance.
- o **Family Care Plan Briefing** – DODI 1342.19, Family Care Plans

Your supervisor and/or SERA will inform you of unit specific training requirements.

Instructions for Completing Annual Requirements

Direct Access

Direct Access is available through the Coast Guard Portal website and is accessible from home without a CAC Reader. Through the Self Service Section in Direct Access, Reservists are able to complete the following:

- Review, retrieve and update their personal contact information
- Review their points summary
- Review their **BAH Dependency Worksheet (CG Form 2020D)** information
- Complete the ASQ
- Request IDTs
- Request ADT Orders
- Additional personnel actions

If you need assistance accessing Direct Access, please contact the following:

Email: PSC-CustomerCare@uscg.mil

Online trouble ticket: <http://www.uscg.mil/hr/psc/ccb/>

Phone: 1-866-PSC-USCG

Requesting Orders:

IDT/ADT Training Schedule

Your position requires you to perform 48 IDT drills and complete 12 to 15 day's active duty training each Fiscal Year (1 October to 30 September). To maintain satisfactory participation standards in the SELRES, a Reservist **MUST** complete a minimum of 90% of the required 48 IDT drills along with their ADT orders.

Each IDT is counted at a minimum as 4-hour work period. A maximum of 2 IDTs can be completed in 1 calendar day. If completing two IDT drills in one day, you may be required to work minimum of 8 hours with a maximum being 24.

You can find Sector Jacksonville's IDT schedule on the reserve web page. Station member's will need to speak with their SERA for unit specific scheduling. After receipt of the IDT schedule, you must input your IDT requests into Direct Access. Recommended that all IDT drills be entered into Direct Access for the whole FY and then modify as needed (funding purposes).

Active Duty Training Orders

Request NLT 30 June or 45 days before start date of the tour (whichever is sooner) - All Reservists are required to complete 12-15 days of active duty training each fiscal year. The annual training dates **MUST** be coordinated through your SERA and/or supervisor. It is the member's responsibility for requesting the ADT orders in Direct Access NLT 30 June or 45 days before the start date of your orders (whichever is sooner). Requests inputted after 30 June may not be approved. Once request is entered, route orders to supervisor for approval who will then send them on to the SPO for processing.

After submitting the Active Duty Training request in Direct Access, the Reservist must continually check Direct Access to ensure the order was approved and not kicked back for corrections.

Additional Active Duty Opportunities Available:

ADOS/Title 14/Title 10 Orders –Reserve opportunities for active duty tours are listed on the following websites:

MRTT website at: <https://www.uscg-mrttcpms.net/uscg.mrtt/mod.vm/home.aspx>.

Active Duty Volunteer message traffic: <http://www.uscg.mil/announcements/volsol.asp>

All Reservists requesting to be placed on ADOS/Title 14/Title 10 orders must receive prior approval from their supervisor/SERA. Approval will not be given to personnel if ANY readiness requirement is RED.

Medical and Dental Requirements

Reservists are required to have a current medical and dental exam on file (completed within one year). The medical PHA must be completed during the member's birth month or up to three months prior, while the dental can be completed anytime during the year. If current exams are not on file, the Reservist will be identified as RED in this readiness requirement and will be restricted from performing duty for pay and points. Follow directions listed below for requesting your annual PHA. Dental exam is required annually and the exam will be covered by Tricare. Dental exams being completed by a civilian doctor must have form DD 2813 filled out and sent (fax/scan/hand deliver) to the HS staff at Sector Jacksonville.. Reservists are authorized one RMP drill for both the PHA and dental exam each year.

Reservist Responsibilities:

- The Reservist must schedule their own dental and medical exam appointments
- The Reservist is required to bring the applicable forms and items provided to their appointments.
- Reservists should keep a copy of the completed exams for their own records.

Instructions for Scheduling a PHA Exam

Step 1:

Contact the PHA Hotline for LHI: 888.697.4299

Step 2:

When asked for Health Record Custodian/ OP-FAC, provide the following number:
(unit's opfac number)

If they cannot locate Sector Jacksonville, you can also inform them that the Health Record Custodian.

Step 3:

Complete the PHA survey at the link below using the correct OPFAC Number: 0737100

Website:

http://www-nehc.med.navy.mil/Healthy_Living/General/healthriskassessment.aspx

The PHA - What to expect:

Once you schedule your PHA appointment and complete the survey at: http://www-nehc.med.navy.mil/Healthy_Living/General/healthriskassessment.aspx, you will be sent a packet via FEDEX to complete and take with you to your PHA appointment. The packet should include a list of medical tests and immunizations that will be completed during the PHA as well as the vials for the medical tests if applicable.

*It is important that you take the entire FEDEX packet that is sent with you to your PHA appointment along with the Health Risk Assessment (data) report that is produced after completing the survey on the web.

* If you do not require any medical blood tests, you will NOT receive the vials. There also may not be any required immunizations listed on the documents that you receive. Please contact HS1 Bartlett if you have any concerns about immunizations that are identified/not identified as required.

If you are unsure of what you should have received or have any questions, please contact HS1 Heather Garrison @ 904-714-7545 or Heather.J.Garrison@uscg.mil

Dental - Instructions for Scheduling a Dental PHA Exam**Step 1:**

Go see your civilian Dental Provider.

If you do not have a provider or Insurance you have 2 options:

1. You can Sign up for low cost Dental Insurance via Tricare:
www.tricareprogram.com/tdptws/enrollees/enrollees.jsp.
2. For those members who do not have insurance and are remote (more than 50 miles from a Dental Treatment Facility (DTF)), you may contact the following number: 1.888.697.4299 to arrange for an appointment or change an appointment.

Step 2:

Once your Civilian Provider has filled out and signed the [DD Form 2813](#), please fax the form to the SECTOR Jacksonville's Medical Clinic @ (904)714-7545 or scan and email to the following email address: Heather.J.Garrison@uscg.mil

If you have any questions or concerns please contact HS1 Heather Garrison @ 904-714-7545.

Contact Information Updates

Reservist ensures Direct Access is updated with current personal contact information (address, phone number). Instructions for updating your address in Direct Access are located on the PPC website (left hand side under Self Service for Members – Change home or mailing address) at:

<http://www.uscg.mil/ppc/ps/>

Your home address can be any address you want to enter but **the mailing address is where your W-2 form and any correspondence will be mailed**. You can select the date the address change will become effective.

Effective Date of Address Change:

Your mailing address change will normally be effective the first day of the month following the month it is submitted. If your mailing address change is submitted on the first day of the month, it will be effective the same month. Examples:

- A mailing address change submitted between 2 and 31 October, will be effective in November and be reflected on the LES issued for November.
- A mailing address change submitted on 1 November, will be effective in November and be reflected on the LES issued for November.
- A mailing address change submitted between 2 and 30 November, will be effective in December and be reflected on the LES issued for December.

Attention Government Travel Charge Cardholders:

Note that address changes submitted for personnel and pay data in Direct Access ([Change Home or Mailing Address](#) or [Employee Address and Home of Record](#)) are not provided to the government credit card company, J.P. Morgan. Card holders must notify J.P. Morgan, separately, when their address changes. The contact information for J.P. Morgan is or log on to their web page and complete <https://gov1.paymentnet.com>

Phone: 1-888-297-0781

Email: CCS-Account-Services@JPMChase.com

Hurricane Roster

You must ensure correct contact information is included on the Hurricane Roster each year in April or when your contact information changes. The information required includes the number of dependents who will be with you in-case of an evacuation. Please provide any updates to your SERA/Supervisor. Your SERA/Supervisor is the point of contact for the Hurricane Roster.

Mandated Training

Members are required to stay current with certain mandated training courses. Some courses are annual, while others are on a bi and tri-annual rotation. With the exception of a few courses, all training can be found on the CG Portal. Members should ensure they stay current on all mandated training and talk with supervisor's in order to ensure all requirements are met.

Individual Development Plan (IDP)

The Individual Development Plan is to be completed at specified times each year based on member's rank. Purpose of this Plan is for member's to put on paper their goals while in the Coast Guard and allows supervisor's to help mentor their people to reach each goal.

ASQ

Must be completed between 1 August and 31 October - Annual Requirement – Reserve Policy Manual, Paragraph 4.A.2 and Federal law requires that all Ready Reservists (Selected Reservists (SELRES) and Individual Ready Reservists (IRR)) be regularly screened to ensure their availability and fitness for duty if mobilized and submit updated information to their chain of command. Coast Guard reservists will complete the screening annually between the dates of 1 August and 31 October. To complete this requirement, all Reservists must access Direct Access and under the Self Service Section, complete the ASQ. Instructions for completing the ASQ in Direct Access are located on the PPC website (left hand side under Self Service for Members – Annual Reserve Screening Questionnaire) at:

<http://www.uscg.mil/ppc/ps/>

Note: If you are having issues accessing Direct Access, contact Direct Access PPC Customer Care at 866.772.8724 or submit an online Trouble-Ticket Form available on the web at:

<http://www.uscg.mil/ppc/ccb/#form> or email: customercare.psc@uscg.mil.

CG Form 3799(R) – CG Form 3799(R) may be used to complete the ASQ requirement after every attempt has been made to complete the form in Direct Access with no success. CG Form 3799(R) is available on the CG Forms website. The form may be completed and provided to SPO for input into Direct Access. Using CG Form 3799(R) for the completion of the annual ASQ requirement is the exception, not the norm.

Weigh-In

Must be completed in the months of April and October - Bi-Annual Requirement – IAW COMDTINST M1020.8(series), Coast Guard Weight and Body Fat Standards Program Manual, the weigh-in readiness requirement must be accomplished twice a year...in the months of April and October. To accomplish this requirement, the Reservist can get weighed by their unit designated weight program manager.

CG 2020D – Emergency Data Card – Each Reservist is responsible for accessing Direct Access and updating their DD Form 93, Emergency Data Card.

Family Care Plan Requirement

Annually - IAW DODI 1342.19, all Coast Guard Reserve members with families should have family care arrangements that reasonably cover all situations, both short and long term. The following members are required to identify themselves to their commander, develop and submit a family care plan:

- (1) Single parents
- (2) Dual-member couples with dependents
- (3) Married with custody or joint custody of a child whose non-custodial biological or adoptive parent is not the current spouse of the member, or who otherwise bear sole responsibility for the care of children under the age of 19 or for others unable to care for themselves in the absence of the member
- (4) Primarily responsible for dependent family members

Family Care Plans must be submitted within 90 days after alert notification. The procedures for developing the Family Care Plan are identified in DODI 1342.19. Members are required to review the DODI to receive complete information. Applicable documentation in the plan includes:

- (1) Names and contact information of the caregiver and alternate caregiver
- (2) Provisions for short-term and long-term absences
- (3) Financial arrangements, allotment(s), and other appropriate documentation, to include power(s) of attorney, to ensure the self-sufficiency and financial security of dependent family members
- (4) Logistical arrangements for the transportation of dependent family members and/or caregivers to a new location.
- (5) The name of any non-custodial biological or adoptive parent not named as the caregiver, along with that person's consent to the family care plan.
- (6) The name of the person the Member designates, in the event of his or her death or incapacity, to assume temporary responsibility for dependent family members until a natural or adoptive parent or legal guardian assumes custody either by order of a court or competent jurisdiction or operation of law.
- (7) A statement signed by the member certifying that the caregiver has accepted responsibility for care of the Member's dependent family members, including provisions for short- and long-term separations.

According to DODI 1342.19, a Member shall revise his or her family care plan within 60 days when changes in family circumstances, or other personal status, result in the Member becoming responsible for the logistical, medical, or financial support of another person. Such family circumstances include, but are not limited to:

- (1) Birth of a child
- (2) Adoption of a child
- (3) Loss of a spouse through death, separation, or divorce
- (4) Enlistment or commissioning in the military (Active or Reserve component) or employment in the Civilian Emergency Workforce (CEW) of the spouse resulting in a dual-Member couple with responsibility for dependent family members.
- (5) Absence of a spouse through career or job commitments or other personal reasons that result in the Member assuming responsibility for dependent family members
- (6) Assumption of sole care for an elderly or disabled family member

NOTES:

Annually, members shall provide written certification to their Commanders, SERA or supervisor that their family care is current.

If all family members are 19 years of age or older and capable of self care, the Member may identify this fact in their Family Care Plan.)

After completion of your Family Care Plan, a copy should be placed in your Reserve Mobilization Readiness Folder.

Mobilization Readiness Folder

It is recommended that each Reservist maintains a mobilization readiness folder with their current Reserve data. The following is a listing of items recommended for the mobilization folder:

Mobilization Readiness Folder Contents

Name: _____ **Unit of Assignment:** _____

Rate: _____ **Date of Rank:** _____

EOE: _____ **Anniversary Date:** _____

Supervisor: _____ **Supervisor Phone:** _____

SERA: _____ **SERA Phone:** _____

RFRS Office: 10426 Alta Dr
Jacksonville, FL 32226 **Phone:** 904-714-7577 or 7579

Admin: 10426 Alta Dr
Jacksonville, FL 32226 **Phone:** 904-714-7529

MOBILIZATION READINESS FOLDER CHECKLIST:

- Certified copy of your marriage certificate
 - Certified copies of birth certificates for yourself and authorized family members
 - Certified copies of court orders or decrees pertaining to persons who are your authorized family members
 - Immunization print out or records: PHS Form 73, International Certificate of Vaccination
 - Copy of your assignment order
 - Motor Vehicle Operator Identification Card, if applicable
 - Passport, if applicable
 - SGLV 8286, Service members' Group Life Insurance (SGLI) and SGLV 8286a (if applicable)
 - DD Form 93, Record of Emergency Data
 - Most recent Personnel Record Review
 - Most recent Point Credit Summary
 - Copy of your ASQ
 - Latest LES
 - Qualifications, Training, and/or Certification information
 - Family Care Plan, if applicable
 - General Power of Attorney or Special Power of Attorney (if applicable)
 - Copies of latest PHA and Dental Exam
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Web Links

Sector Jacksonville Internet - <http://www.uscg.mil/d7/sectjacksonville/Reserves/index.asp>

Resources and Additional Links - http://www.uscg.mil/reserve/member_resources.asp

CG 131 Website - Miscellaneous Information (Awards, Education, Events) -
<http://www.uscg.mil/Reserve/>

CGBI Website - <http://cgbi.osc.uscg.mil/2.0/portal/>

Direct Access - <https://ep.direct-access.us/psp/UCGP1PP/?cmd=login>

Homeport - <http://homeport.uscg.mil/mycg/portal/ep/home.do>

PHA website - http://www-nehc.med.navy.mil/Healthy_Living/General/healthriskassessment.aspx

PPC Tutorials, Presentations, Software Demonstrations and Guides -
<http://www.uscg.mil/ppc/multimedia.asp>

Reserve Message Traffic - <http://www.uscg.mil/Reserve/>

Reserve Personnel Management (i.e. assignments, lateral requests) - <http://www.uscg.mil/rpm/>

TPAX Web (Travel Orders) - <https://ppcms-tpax2003/>

TPAX User Guide - <http://www.uscg.mil/ppc/travel/t-pax/webtpax.pdf>

Tricare (Medical and Dental Insurance) - <http://tricare.mil/>
